

IV. Preparing Survey Helpers to Collect Data

Sample Training Sessions

This section contains materials to help you train volunteers and/or staff to collect surveys from clients and caregivers. Materials include two sample training sessions with detailed facilitator notes and practice exercises. Each session takes about 60-75 minutes. The sessions can be used “as is” or modified to fit the needs of your audience. For example, you may choose to spend more or less time on each of the activities and omit or add your own activities. You may also want to enlist Senior Companion leaders to assist, or lead the training, if available.

Survey Helper Training Session 1: Giving the Survey to Clients/Caregivers to do on Their Own includes instructions on how to introduce the surveys, answer basic questions, and give the surveys to clients and caregivers. Consider giving this session to all volunteers and staff that may be involved in this task. Also, see Appendix H for a *Survey Helper Packet* that volunteers or staff persons could use when collecting surveys.

Survey Helper Training Session 2: Giving the Survey to Clients/Caregivers in an Interview Format is a follow-up session for those staff or volunteers that will assist clients and caregivers who need help filling out the survey. Assistance involves reading questions and marking down the client’s or caregiver’s answers.¹ Ideally, a staff person or Advisory Council member could provide this assistance. However, if staff is not available, a small group of volunteers could be trained to provide assistance.

Senior Companions should never assist their own clients and caregivers to complete the surveys, but they may assist *other* volunteers’ clients and caregivers if needed.

¹ For clients who are not able to answer the survey questions, a family member or caseworker can complete the survey on their behalf (see performance measure instructions: National Performance Measures Instructions (<http://www.nationalserviceresources.org/files/npm/2013-SCP-National-Performance-Measures-Instructions-FINAL.pdf>)).